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ABSTRACT

The study reported in this paper sought to identify reasons why teachers do or do not join unions. In addition, the study sought to disclose relationships between certain demographic characteristics and those reasons. The National Education Association/American Federation of Teachers (NEA/AFT) Membership Questionnaire, a Likert-type attitudinal survey with 16 items, was developed and responded to by 226 randomly selected certified teachers who were employed in a southern state. Data regarding grade level taught, years of teaching experience, age, gender, and political party affiliation were obtained as demographic variables. Of the 226 respondents, 88 belonged to the NEA, and 6 belonged to the AFT. Most of the teachers were females. Union members rated economic and psychological reasons as most important in their decision to join a union. Nonmembers cited social reasons for joining a union. The only demographic characteristic that was a significant predictor of whether a teacher would join a union was political party affiliation. The test instrument and tabulations of survey results are appended. (CB)

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TEACHER UNIONISM:

FACTORS THAT MOTIVATE MEMBERSHIP

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Teacher Unionism: Factors that Motivate Membership

That teachers have the right to join a union is a well settled legal question. The courts have upheld the right for more than 30 years (McLaughlin v. Tilendis, 1968; American Federation of State, County and Municipal Employees, AFL-CIO v. Woodward, 1969; Norwalk Teacher's Assn. v. Board of Education, 1951). While the legal right to join a union is firmly established, there seem to be questions regarding why a teacher would join such an organization.

In a general hypothesis by Bakke (1947), several reasons for joining unions were delineated. The reasons were all related to an individual's attainment of successful living. According to Bakke, successful living means making progress toward experiencing and achieving:

A. the society and respect of other people.

B. the degree of creature comfort and economic security possessed by the most favored of his customary associates.

C. independence in and control over his own affairs.

D. understanding of the forces and factors at work in his world.

E. integrity. (p. 38)

It would appear that the five primary worker goals quoted above could logically be grouped into three

interacting classifications. Society and respect represent social needs. The creature comfort and economic security goals represent economic needs. The remaining three identified by the key words independence, understanding, and integrity may be collectively termed psychological needs.

Van de Vall (1970) attempted to summarize these needs into six categories: the need for affiliation, the need to achieve a more comprehensible cognitive structure, the need for self-esteem, the need for social status, the need for power, and the need for a sense of purpose.

Steele (1952) made similar observations by suggesting that:

> workers who take a lively interest in the union satisfy their needs for fellowship, recognized status, job security, independence of the 'boss,' and a feeling of mastery over their working lives. (p. 83)

The foregoing has been a brief summary of a theoretical basis used to explain why people join unions. The writings are concerned primarily with why people would or would not join their respective unions for the same reasons that private sector employees join their unions. Heisel and Hallihan (1967) identified a combination of four factors that motivate union membership in the public

sector: economic reasons, psychological reasons, social reasons, and political reasons. Chistrup (1966) concluded that public employees probably have the same attitudes and motivations toward unions as have private sector employees. To reverse a relative economic decline was found to be the prime motivating factor in both the public and the private sector (Aussieker, 1970).

In his review of the literature on why people join public sector unions, Coffinberger (1981) has identified three motivational categories: economic reasons, psychological reasons, and social reasons. Coffinberger (1981) summarizes his research on why fire fighters join their particular public sector union:

> The psychological needs for protection from arbitrary actions by management and for participation in the decision-making processes are the most pressing needs of public employees in a non-bargaining environment. However, the desire for an improved economic status and the social pressure exerted by co-workers and others are also major influences in the decision to join a union. (p. 215)

Earlier research done by Imundo (1971, 1972) confirms only two of the three motivating factors. In this study of 312 members of the Armed Forces Government Employees Local 916, Tinker Air Force Base, it was shown that:

> . . . nearly all of the sampled members join the union for psychological and economic reasons. A maximum of 15 percent of the members joined because of some form of social pressure. The 15 percent response is very small when compared to the psychological and economic related questions and the findings of the studies conducted in the private sector. For these reasons the presence of some form of social pressure as a causal factor for members joining the union is discounted. (p. 213)

The major problem involved in this study was to identify the reasons why teachers join or do not join teacher unions. Additionally, the research sought to disclose relationships between certain demographic characteristics and those reasons.

Procedure

A sample of 226 randomly selected certified teachers was drawn from a population of 34,500 who were employed in a southern state during the 1984-85 school year. Data regarding grade level taught, years of teacher experience, age, gender, and political party affiliation were obtained as demographic variables. In addition to this information, responses were solicited relevant to the motivating factors of union membership or non-membership.

The researchers developed the NEA/AFT Membership

Questionnaire which assessed the economic, psychological, and social reasons for membership/non-membership behavior (See Appendix).

The instrument was an attitudinal survey with 16 items, each having a Likert-type response scale. The scale was a continuum of five choices designated as: strongly disagree (SD), disagree (D), neither agree nor disagree (N), agree (A), and strongly disagree (SA). The responses had a value of SD = 1, D = 2, N = 3, A = 4, and SA = 5. Several of the scale items were adapted from items on instruments developed by Coffinberger (1981) and by Gilson and Ramos (1982). Teachers who were members of a teacher union responded to the 16 items in one section of the instrument. Teachers who were not members of a teacher union responded to the same 16 items but stated in the negative in another section of the instrument.

Factor analysis was used to establish construct validity of the instrument which disclosed the presence of three major factors, identified as economic, psychological, and social reasons for joining or not joining a union. Chronbach's alpha reliability coefficients for internal consistency on the factors as well as the whole instrument ranged from .69 to .79. Test-retest reliabilities varied from .49 to .78. These measures were based on responses from 114 certificated

teachers who participated in the validation pilot study.

In analyzing the questionnaires from the 226 study participants, demographic variables and factors validated by the pilot study were used as predictors in a multiple regression model against a dichotomous criterion of membership or non-membership in teacher unions. Questionnaire items relating to each of the economic, psychological, and social factors were tested to determine the extend of their ability to contribute to the prediction of membership or non-membership. The demographic variables were also tested for their collective and individual contribution to the prediction model.

Results and Discussion

Examination of the demographic data revealed that 132 out of the 226 respondents (Table 1) were not members of any union. Of the 94 who were members, 88 belonged to the NEA while only 6 belonged to the AFT. The sample was primarily composed of female teachers. A plurality of the respondents were democrats and Table 1 indicates that almost half of all the respondents were in mid career.

Insert Table 1 about here

On the economic reason variables for joining or not joining a teacher union, union members rated these reasons

higher than did non-members (Table 2). Union members also rated the psychological reasons higher whereas non-members rated social reasons higher.

Insert Table 2 about here

Table 3 indicates that psychological reasons and social reasons were significant predictors of whether or not teachers joined teacher unions. Economic reasons were not. Of the psychological reasons for joining or not joining, only one, cost of membership for benefits received, was a significant predictor. Specifically, these teachers seemed to be concerned with whether or not the benefits they might have received outweighed the cost of their membership. Initially, this reason appears to be more of an economic one than a psychological one. However, the question is more likely to be one of perception than of money. If a teacher perceives the union to be beneficial, the cost is likely to be thought of as a secondary concern and membership might be justified. If the perception is that the benefits do not justify the expense, membership in the union may not be a priority with the teacher.

Insert Table 3 about here

Of the social component for joining or not joining a teacher union, two reasons external to the teaching profession were significant predictors. These were the influences of parents and the influences of friends outside the teaching profession. It would appear that recruitment by the union, social interaction with colleagues, mutual problem solving, communication with colleagues, and the general influence of colleagues were not grounds for making the decision. Rather, the decision to become a union member or not may have been influenced by the teacher's parents and friends outside the teaching profession. On these reasons, more than on any other, the sample was split. Union non-members rated these external social reasons somewhat higher than did union members.

Of the demographic characteristics surveyed, only one, political party affiliation, was a significant predictor of whether a teacher would or would not join a teacher union. All others were of little or no value as predictors.

It appears that the teachers in the state from which the sample was drawn were, at the time this study was conducted, rather ambivalent about teacher unions. Even though some reasons for joining or not joining a teacher union emerged as significant predictors, no reason or group of reasons was very conspicuous. The mean response

on all of the reasons tended to cluster around the center. A "middle of the road" attitude seemed to prevail. Moreover, standard deviations in Table 2 indicated an absence of strong disagreement on the issues.

Coffinberger (1981) found that people join unions for economic and psychological reasons but not for social reasons. Imundo (1972) found substantially the same things. Bakke (1947) theorized that the motivators of union membership were economic, psychological, and social in nature. This study found that certain psychological and social reasons could be used as predictors of union membership status. It did not find that economic reasons were significant predictors of that behavior. This does not mean to say that economic issues are unimportant to teachers. Rather, a more complex motivating factor may be responsible for this result. Many teachers would like education to be perceived by the general public as a profession that enjoys the same social and economic status as do other professions. This desire might not be strictly an economic issue.

Future studies should investigate the possible presence of psycho-economic and/or socioeconomic reasons as predictors of union joining behavior. In examining these new variables, some indicator of the economic status of the area under study should be included as a

demographic variable. The cost of living index is one such indicator which could be used.

The South, historically, has not had a pro union orientation. It would be instructive to determine if the union movement is gaining sustained impetus throughout the South or if the recent increase in union activity within some southern states is a short term phenomenon. Studies leading to the comparison of intra-regional and inter-regional results would greatly enhance the knowledge base currently extant regarding teacher union joining behaviors.

APPENDIX

NEA/AFT MEMBERSHIP QUESTIONNAIRE

NEA/AFT MEMBERSHIP QUESTIONNAIRE

Descriptive Data Section

Please complete the items in this section by checking the appropriate response or by filling in the blank with the appropriate information.

1. Select the grade level grouping below that most accurately describes the level at which you spend most of your time teaching. (Please select only one response.)

   Grades K-2____; Grades 3-5;____; Grades 6-8____; Grades 9-12____.

2. Including the current school year, how many total years of teaching experience do you have? _____

3. Age: 21-26____; 27-32____; 33-38____; 39-43____; 44-48____; 49-53____; 54-58____; 59-63____; over 63____.

4. Gender: Male____; Female____

5. Politically, I consider myself

   a Democrat____; a Republican____; an independent____.

6. I am a member of the AFT ____; the NEA____; Both____; Neither____.

NOTE: If you are not a member of either the NEA or the AFT, please complete the section entitled NON-MEMBERSHIP REASONS on page 2. If you are a member of either or both organizations, please complete the section entitled MEMBERSHIP REASONS on page 4.

NON-MEMBERSHIP REASONS

Below are 16 statements based on why people choose not to join an organization such as the NEA or the AFT. Please indicate your opinion on the scale that follows each statement.

Strongly disagree (SD)
Disagree (D)
Neither agree nor disagree (N)
Agree (A)
Strongly Agree (SA)

I have chosen not to join either the NEA or the AFT because:

1. these organizations are not effective in improving working conditions. (SD) (D) (N) (A) (SA)

2. these organizations are not effective in protecting my rights as a school district employee. (SA) (A) (N) (D) (SD)

3. these organizations do not provide me with opportunities for meaningful leadership positions. (SD) (D) (N) (A) (SA)

4. my colleagues influenced me not to join either organization. (SD) (D) (N) (A) (SA)

5. these organizations limit my chances of having my complaints and grievances heard by my supervisors. (SD) (D) (N) (A) (SA)

6. effective communications with my fellow teachers are diminished by membership in these organizations. (SA) (A) (N) (D) (SD)

7. these organizations tend to decrease chances of salary increases. (SA) (A) (N) (D) (SD)

8. the professional organization experiences of my parents influenced my decision not to join either organization. (SD) (D) (N) (A) (SA)

9. neither organization actively sought my membership. (SD) (D) (N) (A) (SA)

10. membership in either organization tends to inhibit promotion based on fair competition and selection. (SA) (A) (N) (D) (SD)

11. cost of membership is too high when compared to the benefits I would receive. (SD) (D) (N) (A) (SA)

12. my friends outside my profession influenced my decision not to join either organization. (SA) (A) (N) (D) (SD)

(Continued on Page 3)

13. neither organization provides opportunities for social interaction with my colleagues. (SD) (D) (N) (A) (SA)

14. neither organization affords me the opportunity to improve my performance as a classroom teacher. (SA) (A) (N) (D) (SD)

15. neither organization provides adequate opportunities for me to work with my fellow teachers to resolve mutual problems. (SD) (D) (N) (A) (SA)

16. neither organization is effective in improving the fringe benefits my school district offers its teachers. (SA) (A) (N) (D) (SD)

If you so desire, please list or describe any reasons not presented above that would help me understand your reasons for not joining either the NEA or the AFT. Thank you for your time in responding to this instrument.

MEMBERSHIP REASONS

Below are 16 statements based on why people choose to join an organization such as the NEA or the AFT. Please indicate your opinion on the scale that follows each statement.

Strongly disagree (SD)
Disagree (D)
Neither agree nor disagree (N)
Agree (A)
Strongly agree (SA)

I have chosen to join either the NEA or the AFT because:

1. my organization is effective in improving working conditions. (SD) (D) (N) (A) (SA)

2. my organization is effective in protecting my rights as a school district employee. (SA) (A) (N) (D) (SD)

3. my organization provides opportunities for meaningful leadership positions. (SD) (D) (N) (A) (SA)

4. my colleagues influenced my decision to join my organization. (SD) (D) (N) (A) (SA)

5. my organization increases my chances of having my complaints and grievances heard by my supervisors. (SA) (A) (N) (D) (SD)

6. effective communications with my fellow teachers are increased by membership in my organization. (SA) (A) (N) (D) (SD)

7. my organization has a positive influence on salary increases. (SA) (A) (N) (D) (SD)

8. the professional organization experiences of my parents influenced my decision to join my organization. (SD) (D) (N) (A) (SA)

9. I was actively recruited by members of my organization. (SD) (D) (N) (A) (SA)

10. membership in my organization increases my chances of promotion based on fair competition and selection. (SA) (A) (N) (D) (SD)

11. cost of membership in my organization is compatible with the benefits I receive. (SD) (D) (N) (A) (SA)

(Continued on Page 5)

12.	friends outside my profession influenced my decision to join my organization.	(SA) (A) (N) (D) (SD)
13.	my organization provides opportunities for social interaction with my colleagues.	(SD) (D) (N) (A) (SA)
14.	my organization affords me the opportunity to improve my performance as a classroom teacher.	(SA) (A) (N) (D) (SD)
15.	my organization provides adequate opportunities for me to work with my fellow teachers to resolve mutual problems.	(SD) (D) (N) (A) (SA)
16.	my organization is effective in improving the fringe benefits my school district offers its teachers.	(SA) (A) (N) (D) (SD)

If you so desire, please list or describe any reasons not presented above that would help me understand your reasons for joining either the NEA or the AFT. Thank you for your time in responding to this instrument.

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TABLE 1

Categorical Frequencies of the Respondents on the Demographic Variables

Variable	Frequency	Percent
Grade Level (GL)		
K-2	44	19.6
3-5	56	25.0
6-8	48	21.4
9-12	76	33.9
Years of Teaching Experience (YRS)		
1-5	25	11.6
6-10	48	22.5
11-15	58	27.1
16-20	48	22.5
21-25	19	8.9
26-30	9	4.1
Over 30	7	3.3
Age Category (AGE)		
21-32	58	26.1
33-43	104	46.9
44-53	39	17.5
Over 53	21	9.5
Gender (GENDER)		
Male	48	21.4
Female	176	78.6
Political Affiliation (POLAFF)		
Democrat	103	46.6
Republican	73	33.0
Independent	45	20.4
Union Membership Status (MEMB)		
Member	94	41.6
Non-Member	132	58.4
Membership in Which Union (ORG)		
AFT	6	6.4
NEA	88	93.6

Note: While the total number of responses was 226, not all respondents provided information for every category. Therefore, frequency totals for each variable are less than 226.

TABLE 2

Means and Standard Deviations of the Variables for Union Members and Non-Members

Variable	Means		Standard Deviations	
	Union Members	Union Non-Members	Union Members	Union Non-Members
1 ECON	3.8	2.8	0.9	1.1
2 ECON	4.0	3.0	1.0	1.0
3 PSYCH	3.5	2.8	0.9	0.8
4 INTSOC	3.0	4.1	1.3	1.0
5 ECON	3.8	3.5	1.0	0.8
6 INTSOC	3.5	3.7	1.0	0.9
7 ECON	4.0	3.7	1.0	0.8
8 EXTSOC	2.3	3.9	1.1	1.0
9 INTSOC	3.1	2.8	1.2	1.2
10 INTSOC	3.1	3.4	1.1	0.8
11 PSYCH	3.0	1.6	1.3	0.8
12 EXTSOC	2.2	3.9	0.9	0.9
13 INTSOC	3.5	3.3	0.9	0.9
14 PSYCH	3.5	2.6	1.0	1.1
15 PSYCH	3.5	2.9	1.0	1.0
16 ECON	3.3	2.5	1.2	1.2
ECON (1,2 5,7,16)	3.8	3.1	0.7	0.7
PSYCH (3,11, 14,15)	3.4	2.5	0.8	0.7

Table 2--Continued

Variable	Means		Standard Deviations	
	Union Members	Union Non-Members	Union Members	Union Non-Members
SOC*	3.0	3.6	0.6	0.6
INTSOC (4, 6,9,10,13)	3.2	3.4	0.6	0.6
EXTSOC (8,12)	2.2	3.9	0.8	0.8

*The two variable INTSOC & EXTSOC were pooled to create a fifth variable termed Social Reasons and abbreviated SOC.

NOTE: Union member group and non-member group characteristics based on 94 and 132 subjects, respectively.

TABLE 3

Comparison of the Full and Restricted Models

Models	R^2	$R_F^2-R_R^2$	df	F
FM-O	0.71	0.71	21,179	16.43*
FM-ECON	0.70	0.01	16,179	1.00
FM-PSYCH	0.68	0.03	17,179	3.75*
FM-SOC	0.51	0.20	14,179	15.00*
FM-GL, YRS, AGE GENDER, POLAFF	0.66	0.05	16,179	2.50*
FM-GL, YRS	0.70	0.01	19,179	1.50
FM-YRS	0.71	0.00	20,179	0.00
FM-AGE	0.70	0.01	20,179	1.25
FM-POLAFF	0.69	0.02	20,179	5.00*
FM-INTSOC	0.70	0.01	15,179	1.00
FM-EXTSOC	0.58	0.13	19,179	32.50*
FM-ITEM 3	0.71	0.00	20,179	0.00
FM-ITEM 11	0.69	0.02	20,179	10.00*
FM-ITEM 14	0.71	0.00	20,179	0.00
FM-ITEM 15	0.71	0.00	20,179	0.00
FM-ITEM 8	0.68	0.03	20,179	15.00*
FM-ITEM 12	0.68	0.03	20,179	15.00*

Note: Full model (FM) based on predictors of GL, YRS, AGE, GENDER, POLAFF, ECON, PSYCH, and SOC with a criterion of MEMB (see Table 1).